

3 Ways to Restore Salesforce Data



3 Ways to Restore Salesforce Data

How do you know when you need to do more to protect your Salesforce data? In the worst-case scenario, you find out the hard way, like these Salesforce administrators:

"We were doing a major change, merging two different orgs in Salesforce. Although we thought we had prepped for the change-over correctly, we had a significant data loss when the data in one Object was overwritten during the merge. It took us weeks to clean up that mess, and we still didn't get everything back that we lost."

"I learned the hard way that changing field types can result in Salesforce data loss. We changed our Country field from a text field to a picklist, and reps were entering "US," "USA," "United States," and every other variant you can think of. Not only did we lose our previous data, the territory assignment rules we had were completed borked by the data loss. Trying to fix this made for a horrible month."

"We had a Long Text Area Field that reps used to keep Contact notes. A new admin updated that Field to a Text Area, and thus truncated the data to just the first 255 characters - this meant we lost details our sales reps said they relied on, and the screaming is still going on."

Everyone is at risk for disastrous losses like these in SaaS applications like Salesforce. When the worst happens, there are three options for restoring your lost Salesforce data.

Option 1: Salesforce Data Recovery Service

If you have no process in place for backing up your valuable Salesforce data, you're taking a big chance. If something goes wrong that causes you to lose data, you won't have it available to restore to Salesforce. The [Salesforce Data Recovery Service](#) is really the only option for getting data back when you haven't been doing regular backups of some kind.

As Salesforce explains: "Data Recovery is a last resort process where Salesforce.com Support can recover your data at a specific point in time, in the case that it has been permanently deleted or mangled during a data import." The process can take weeks to months, and while the exact cost will depend on how much manual effort is required for Salesforce to recover the data, "the price for this service is a minimum of \$US 10K (Ten Thousand US Dollars)."

THE SALESFORCE DATA RECOVERY SERVICE

- A "last resort" process
- Costs \$10K minimum
- May take a few weeks
- Doesn't recover metadata

The good news is that you'll get a complete backup of all the data you lost. The bad news is that it won't include any metadata. And you'll have to import the data back into Salesforce yourself – or pay someone else to do it, on top of the recovery charge you've already paid to Salesforce.

Option 2: The Weekly Export

Salesforce.com [offers a process](#) for manual, weekly data backup and export to help protect your data. It's called the Weekly Export. There are two constraints with the Weekly Export, though:

1. Completing the Weekly Export is a manual process, and may require a lot of work.
2. It doesn't offer complete protection.

THE WEEKLY EXPORT

- Manual process
- Occurs weekly, not daily
- Doesn't recover metadata

The weekly manual process requires you to download all your zipped Weekly Export files. Some organizations find these can number in the double digits and take up hundreds of gigabytes, given that each file is 2GB. Downloading this amount of information takes time; ensuring the downloads are all complete and that there were no errors takes time; and moving the data to local storage takes time. The storage costs can also be considerable, depending on the size of your organization.

In addition to the constraints noted above is one additional, important constraint: the Weekly Export is at best completed once a week, and a lot can change in a week - or even in a day, thanks to new lists, customizations, and other changes. We found that the average Salesforce domain has **26,000 changes per day**. If you have no way to back up this valuable data more frequently, you run the risk of losing it. Additionally, since the Weekly Export process does not include metadata, any customizations that are lost or accidentally changed would have to be manually rebuilt.

"Your Salesforce data changes over 26,000 times PER DAY."

Imagine your backups occur every Friday, but you import a new list of leads on Thursday. An error could easily cause the new list to overwrite your original data, deleting hundreds of customer contacts. Your only recourse would be to locate the export from the previous Friday (six days earlier) and spend countless hours (or even days or weeks) locating archived files, downloading them, and then sifting through the entire set to find the information you need and manually uploading it back into Salesforce.

Furthermore, because Salesforce Weekly Exports don't include any of the customizations, formatting, or other metadata associated with your data, it will also be necessary to recreate those. How long would it take to manually recreate all of your dashboards and reports if they were lost?

Unfortunately, any changes you made in the days since the last backup would be completely gone, at which point it's back to square 1 - or, in this case, option 1: Salesforce Data Recovery, to the tune of \$10,000 or more.

Option 3. Third-Party Backup

While Salesforce points to its own data export feature as a means of preventing permanent data loss, they also recommend customers use a partner backup solution. It's true: to reduce the risk of data loss between Weekly Exports, Salesforce suggests users go to AppExchange and look for a third-party backup and restore solution. Using a third-party solution for automated daily backup offers three distinct advantages:

THIRD-PARTY BACKUP

- Automatic
- Occurs daily
- In-app restore
- Metadata and customizations are restorable

1. Lower risk

Automated daily backup enables you to keep up with all the Salesforce data changes that take place every day. And the rate of change can be high, as users update customer information, add new leads, close deals, and more countless times each day. At 26,000 changes per organization per day, that's 155,000 opportunities for data loss between weekly exports.

“Salesforce recommends purchasing a third-party backup and restore solution.”

2. Less effort

Automated data backup that lets you “set it and forget it” requires much less time and effort compared to the Weekly Export. Consider, too, that since major projects, daily needs, and occasional emergencies take most of an admin's time, it can be easy to miss the 48-hour window to download a Weekly Export. This is consistent with what we've heard from many Salesforce admins: no matter the organization size, whether new to Salesforce or experienced, they acknowledge that their weekly export is not consistently downloaded every week. That's why you need a tool that works in-app to automatically back up data (including metadata) daily and to quickly restore everything in the event of a loss.

3. Lower cost

The volume of Salesforce data you have to store onsite for backup purposes will quickly grow as you continue to add customer contracts, support documents, proposals, reports, and more to Salesforce. This requires more admin time for managing and monitoring data exports, as well as more capital costs for storage infrastructure. A cloud-to-cloud daily backup solution with unlimited storage provides a much less costly alternative.

Best Practices for Salesforce Backup and Restore

If you want to avoid paying thousands to get your Salesforce data back after a loss, you need to have a daily backup process in place and a way to easily and completely restore lost data and metadata. The Weekly Export process provided by Salesforce is simply not the most efficient or effective way to meet these demands, nor does it enable you to quickly or easily restore your Salesforce data to its prior state. As you think about alternatives for Salesforce backup and restore in your business, keep in mind the following best practices we've learned from Salesforce community members:

- Look for backup solutions that are in-app for greatest ease of use. You don't want to augment the Weekly Export with something that adds complexity; you should be able to "set it and forget it."
- Make sure your backup solution provides in-app restore of lost data. Backups are useless if they don't allow you to restore data quickly and easily.
- Check out the reviews on AppExchange for backup solutions.
- Leverage the experiences of the Salesforce community, including MVPs. (You can find MVPs through Salesforce User Groups near you.) If you're not active in the Salesforce Success Community, start getting active now. And talk with Salesforce MVPs in your area about better ways to handle backup than the Weekly Export.
- Find a backup solution that proactively and transparently notifies you of any problems with your backups, either via email or through Chatter, or through Salesforce1 when you're mobile. You don't want to find out about those problems on the day you're trying to restore your lost data.
- Partner with your IT department to discuss best practices and policies around protecting your Salesforce data in the same way IT protects other cloud-based data and on-premises data. They have experience in this area and can be a valuable ally.

"Partner with your IT department to discuss best practices and policies around protecting your Salesforce data."

Your Salesforce data is valuable, and like all data, it's subject to loss for a variety of reasons. As your organization's Salesforce owner, it's important for you to protect this critical data. Automatic daily backup is the key to doing this. The best time to prepare for disaster is before it happens; when it does, you can be the calm one in the room who knows your missing data is just a few clicks away.

About Spanning

Spanning, an EMC company and a leading provider of backup and recovery for SaaS applications, helps organizations to protect and manage their information in the cloud. We provide powerful, enterprise-class data protection for Google Apps, Salesforce, and now Office 365. Spanning Backup is the most trusted cloud-to-cloud backup solution for thousands of companies and millions of users around the world.

Try It Now

To learn more about Spanning Backup for Salesforce and try it free for 14 days (no credit card, no obligation), visit www.spanning.com/free-trial-salesforce/.